Proposal Basics → Proposal Details Panel

Consolidated key identifying information and dates about the proposal.

Field Name	Definition / Use
Proposal Type	Used to identify the type of proposal (e.g. New, Resubmission, Revision, etc.).
Lead Unit	The unit/department assigned to this proposal.
Activity Type	The university functional area for this proposal (e.g. Research, Instruction, Student Service, Fellowship, etc.).
Project Dates (from / to)	Beginning and end of the entire project period.
Project Title	Project title.
Sponsor	A unique identifier for the sponsoring organization for the project. Kuali will display the Sponsor Name to the right of the Sponsor Code.
Prime Sponsor	A unique identifier for the prime sponsoring organization, which is the original funding source for the project. Kuali will display the Prime Sponsor Name to the right of the Prime Sponsor Code. Complete this field if your institution will not submit this proposal directly to the funding agency, but to a collaborator for inclusion in their application to the funding agency. (e.g. you are submitting as a subawardee).
Keywords	Institutionally define keywords related / relevant to the project.
Conditionally invoked fields:	
Award ID	For non-new proposals (e.g. Resubmission, Renewal, etc.), the Award ID field appears and may be used to search the Award module to link that record for reference and Medusa views.
Original Institutional Proposal ID	For non-new proposals (e.g. Resubmission, Renewal, etc.), the Original Proposal ID field appears to search the Institutional Proposal module for the prior submission.

Proposal Basics → Delivery Info Panel

The Delivery Info section can be used to provide additional information for reviewers and submitters. In addition, if the proposal is connected to a Grants.gov Opportunity (for S2S submission) the following message will display: *'This proposal is being submitted via an S2S opportunity. As such, it will be submitted electronically. The delivery information on this page will not be needed.'*

Field Name	Definition / Use
Submission By	The person / group / office responsible for submitting the proposal to sponsor.
Submission Type	Delivery method for the proposal.
Submission Account ID	Accounting ID / Number for mail costs associated with the proposal submission.
Submission Name & Address	The name and address where the proposal needs to be delivered / submitted to (auto-populated by contact information in the KC Address Book/Non-Employee Lookup).
Number of Copies	Number of proposal copies needed to be submitted, as instructed by the sponsor institution.
Submission Description	Additional information to assist with the delivery of the proposal to the sponsor.

Proposal Basics → Sponsor & Program Information Panel

Field Name	Definition / Use
Sponsor Deadline Date	Used to identify proposal deadline date.
Sponsor Deadline Time	Used to identify proposal deadline time.
Sponsor Deadline Type	Used to identify proposal deadline type (e.g. Receipt, Target, Postmark).
Notice of Opportunity	The type of funding opportunity announcement.
Opportunity ID	The unique identifier associated with sponsor's funding opportunity.
CFDA Number	A five-digit unique identifier for the sponsor and the funding opportunity announcement (FOA). The first 2 digits identify the federal agency. The last 3 digits identify the specific federal program.
Subaward: Yes, this proposal include subaward(s)	An indication of whether the proposal includes subawards to other institutions or entities.
Sponsor Proposal ID	The unique identifier defined by the sponsor for the proposal.
NSF Science Code	An identifier for the type of research activity. Your institution may require that proposals include a NSF Science Code for all sponsors. National Science Foundation (NSF) code is used by many institutions to support local and federal reporting requirements (e.g. HERD Survey).
Anticipated Award Type	The type of funding instrument expected if an award is made (e.g., grant, contract, cooperative agreement).

Agency Routing Identifier	Unique number assigned by the funding agency.
Prev Grants.gov Tracking ID	Unique tracking ID number of previous S2S submitted proposal.
Opportunity Title	Title of funding program.
Conditionally invoked fields:	
Sponsor Division Code	Field appears when proposals are linked to an S2S Opportunity. Required for NSF S2S proposals: located at https://www.fastlane.nsf.gov/pgmannounce.jsp
Sponsor Program Code	Field appears when proposals are linked to an S2S Opportunity. Required for NSF S2S proposals: located at https://www.fastlane.nsf.gov/pgmannounce.jsp

Proposal Basics → Organization and Location Panel

Field Name	Definition / Use
Applicant Organization Tab *The information in the Applicant Organization Tab includes information automatically populated from the Organization ID 000001. It contains all the identifying information required to submit proposals via S2S, including address information, tax IDs, assurance numbers, DUNS numbers and more. The data cannot be modified on this screen, with the exception of the Congressional District field.*	
Organization Name	Name of the Applicant Institution.
Address Line 1	Address of the Applicant Institution.
Address Line 2	Address of the Applicant Institution.
Address Line 3	Address of the Applicant Institution.
City	City of the Applicant Institution.
State	State of the Applicant Institution.
Postal Code	9-digit postal code of the Applicant Institution
Congressional District	Congressional District of the Applicant Institution
Performing Organization Tab	

The information in the Performing Organization tab will initially be populated with the information from the Applicant Organization tab. The information may be replaced as needed, with a different Organization for specific proposals.
Performance Site Locations Tab *The information in the Performance Site Locations tab may be used to identify additional sites where a significant amount of research activity will be performed as part of the project. These locations may be selected from the Address Book by clicking "Add Performance Site'.*
Other Organizations Tab *The information in the Other Organizations tab may be used to identify subawardees of the project. These subawardees may be selected from the Organization table by clicking "Add Organization".*

Key Personnel → Personnel Panel

Identifies investigators and key personnel and their role within the project. Drill down to display additional person details, degree information, training records, unit associations and certification status.

Field Name	Definition / Use
Details Tab *Basic Information on each key person.*	
Proposal Person Role Id	Role designation on the proposal / project.
Full Name	The full name of the individual.
Username	The system username of the individual.
First Name Middle Name Last Name	First, Middle, and Last name of the individual.
eRA Commons User Name	The Agency Credentials of the individual. Used in S2S submissions.
Include in Credit Allocation	Checkbox to indicate if the person should also appear in the Credit Allocation section.

Organizations Tab More detailed information about the individual. This will be pre-populated with data from the Person and Person Extended Attributes tables as default when a person is added to a proposal.

Extended Details Tab Additional information about the individual, such as Citizenship, Education, etc..	
Degree Tab Degree information for the individual.	
Unit Details Tab When a person is added, their primary appointment unit is listed by default. For the PI, the PI's primary unit is listed, and, if the Lead Unit of the proposal is NOT the PI's primary unit, the Lead Unit will also be displayed under the PI. The collective list of Units listed is used for Credit Allocation and can be used for routing.	
Person Training Details Tab Training information for the individual. This is a display-only section and includes data found in the Person Training maintenance document. Changes and updates to training records must be done in the Person Training maintenance document.	
Proposal Person Certification Tab Certification questions that PI(s), Investigators and Key Personnel may be required to answer.	
<Investigator Names and Units>	Investigators' names and units which were entered on the Personnel panel.
Credit	This section identifies the percentage of credit attributable to each Investigator / Key Person, and to their units, for the credit split types defined by the institution.

Compliance

Information pertaining to reviews required for regulatory compliance. Types may be identified, their approval status is recorded, and relevant protocol number, and key date information is displayed, along with access to any comments provided.

Field Name	Definition / Use
Type	Compliance / Special Review type needed / relevant for the proposal (e.g. Human Subjects, Animal Usage, Biohazards, etc.)
Approval Status	Approval Status of the Compliance / Special Review Type (e.g. Pending, Approved, etc.)
Protocol Number	A unique number assigned by the institution and/or compliance committee to a specific Protocol.
Application Date	The application date the protocol/request for permission to the relevant institutional committee/person was submitted.

Approval Date	The date the Compliance / Special Review was approved.
Expiration Date	The date, after which, the approval expires.
Exemption #	One of six categories of exempt research specified by the Federal Common Rule (45 CFR 46.101(b)). If the proposed project is exempt, as defined by the institutional committees, an exemption number is generally issued, and is entered into this field.
Comments	Additional information relevant to the Compliance / Special Review type.

Attachments

Sponsor and institutionally defined attachments applicable to the proposal (e.g. research strategy, project summary, biosketch, current and pending support, copy of submitted proposal, sponsor communications, other approvals, etc.).

Field Name	Definition / Use
Proposal Tab *This section is where narrative attachments are uploaded for inclusion in your proposal submission. The Attachment Types available from the drop-down list will depend on the type of submission. If an S2S opportunity has been linked to the proposal, the list of Attachment Types will include those types that 'map' to the electronic form. If no S2S opportunity is linked, a shorter list of attachment types is displayed. Any type of file may be uploaded, saved, and transmitted; but please refer to sponsor instructions for the specific file type required.*	
File <name>	The file name of the uploaded attachment.
Type	The category of attachment uploaded (project summary, narrative, budget justification, etc.)
Status	Status of the attachments; complete or incomplete (draft).
Description	Additional user entered description relevant to the attachment.
Uploaded By	Displays username of user that uploaded the specific attachment.
Posted Timestamp	Displays date of the last update.
Personnel Tab *This section is where proposal person specific attachments are maintained: Biosketch, Budget Details, Current/Pending, Other, and Statement of Commitment attachment types are available here for each proposal person. These narrative types are mapped to S2S forms.*	
File <name>	The file name of the uploaded attachment.
Added By	Username of user that uploaded the specific attachment and the date & time of when the attachment was uploaded.
Person	Name of the individual for whom the attachment was uploaded.

Type	The category of attachment uploaded (biosketch, current and pending support, etc.)
Description	Additional user entered description relevant to the attachment.
Internal Tab *This section is used to provide attachments for internal review or to meet local business requirements.*	
File <name>	The file name of the uploaded attachment.
Type	The category of attachment uploaded (institutional attachment, sponsor communication, etc.)
Status	Status of the attachments; complete or incomplete (draft).
Description	Additional user entered description relevant to the attachment.
Uploaded By	Displays username of user that uploaded the specific attachment.
Posted Timestamp	Displays date of the last update.
Abstract Tab	
Author	Username of user that added the Abstract and the date & time of when the abstract was added.
Abstract Type	The type of abstract.
Abstract Details	Abstract details as entered by the user.

Notes Tab *This section may be used to insert text notes related to the proposal.*	
Author	Username of user that added the Abstract and the date & time of when the abstract was added.
Topic	The note topic as entered by the user.
Text	Note text as entered by the user.

Questionnaire

The questionnaire screen displays questionnaires that have been maintained to appear in your proposal. If more than one questionnaire is valid for your proposal, you will see multiple named tabs in the screen.

Field Name	Definition / Use
Questionnaire Tab(s)	If more than one questionnaire is valid for your proposal, then each questionnaire will be housed under it's own tab.

Incomplete / Complete	Questionnaire status indicator; when all the questions are answered and saved, the status shows as complete.
Print	Click this button to generate a PDF printed report of the questionnaire.

Access

This section is used to identify users who can access a proposal independent of other roles they may have in the system. System Roles & Permissions define user access to documents at the system level. In addition to proposal access defined by system roles, Proposal Aggregators can grant access to specific users, with defined roles at the document (proposal) level.

Field Name	Definition / Use
Username	Person's username.
Roles	List of roles assigned to the person.

Role Descriptions

- Aggregator Document Level: The Aggregator has all permissions for a proposal. This is the highest level administrative permission level for a proposal, and only individuals who have Aggregator permissions, or are in the ORP office can submit a proposal for review. This role allows a user to see institutional salaries, modify budgets, rates, attachments, change S2S linkages while the document is enroute, and recall a document that is part of the way through routing. The initiator of a proposal will automatically be granted the Aggregator role in the document.
- Aggregator Only Document Level: This role is a more limited form of Aggregator. An Aggregator Only can modify all proposal, budget, and attachment data. They can also submit a proposal document for review. This role cannot recall, change rates, see institutional salaries, or change S2S linkages after a proposal is submitted for review. Members of this role are not included in the Aggregator search field in the Proposal Development search.
- Budget Creator Document Level: This role allows a user to create and maintain budgets in a proposal, and to view all other data in a proposal. This role also allows you to view institutional salaries and modify rates in a proposal.
- Budget Creator Only Document Level: This role allows a user to view a proposal, as well as create and maintain budgets in the proposal. It does not provide access to institutional salaries, or the ability to change rates in a budget.
- Narrative Writer Document Level: This role allows a user to modify the data in a proposal development document, including the attachments. It provides view only access to the budget.

- Viewer Document Level: This role gives a user the ability to view all data in a proposal, but does not allow them to change any data in the proposal or budget.

The available roles in dropdown are pulled from the Roles specified with Role Type 'Derived Role: Document Access Role Types' which you can activate/inactivate as desired. Other out of the box roles that can be used are below, however, they may not make sense for your local process and we often recommend to deactivate the Roles via the System Admin tab:

- Approver Document Level: This role allows a user to approve a proposal, however, typically proposal workflow would achieve the appropriate approvals so isn't recommended for use.
- Access_Proposal_Person_Institutional_Salaries Document Level: Gives a user with the Budget Creator rights to also have edit ability and access to institutional salaries.
- View Institutionally Maintained Salaries Document Level: Gives a user view rights to Institutional Salaries in proposal budget.
- Delete Proposal Document Level: Gives a user the delete proposal option on the Summary/Submit tab of a proposal not yet routed for review.

Supplemental Information

This section contains institutionally defined supplemental information, also known as Custom Data. These items may be used to collect data not captured by baseline Kuali Research Proposal Development module. Custom Data fields are displayed in tabs and sections within tabs as specified when the custom data fields are configured.

Summary / Submit

This section has multiple purposes. With the Action buttons at the bottom of the screen, the proposal may be submitted for review, approved, canceled, deleted, routed to ad hoc recipients and recalled. As part of the routing and review process, this is the screen where proposal summary data can be viewed from a single screen to expedite review and approval.